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Follow-up to the International Year of Older Persons: Second World Assembly on Ageing

Follow-up to the Second World Assembly on Ageing

Report of the Secretary-General

Summary

The present report introduces the road map for the implementation of the Madrid International Plan of Action on Ageing; it highlights the main gender dimensions of the Madrid Plan of Action; it also reviews the progress in defining the modalities for the review and appraisal of the Plan and outlines major developments during the first year of the implementation process. A number of recommendations in bold are presented to the General Assembly for consideration.

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I. Introduction

1. The present report addresses General Assembly resolution 57/167, by which the Assembly endorsed two major outcomes of the Second World Assembly on Ageing: the Political Declaration and the Madrid International Plan of Action on Ageing. In the same resolution, the Assembly called upon Governments, the United Nations system and all other actors to take the necessary steps to implement the Madrid Plan of Action and encouraged the international community further to promote cooperation among all actors involved in the implementation of the Plan. In this connection, the Assembly welcomed the preparation of a road map for the implementation of the Madrid Plan of Action by the United Nations Programme on Ageing and invited all relevant actors to contribute to its preparation. In the same resolution, the Assembly invited the Commission for Social Development, as the entity responsible for the follow-up to and appraisal of the implementation of the Madrid Plan of Action, to consider integrating the different dimensions of population ageing as contained in the Plan in its work and to consider the modalities for reviews and appraisals at its forty-first session in 2003.

2. The report also responds to General Assembly resolution 57/177 on the situation of older women in society. In that resolution, the Assembly stressed the importance of mainstreaming a gender perspective, taking into account the needs of older women in policy and planning processes at all levels. It emphasized the need to develop and improve the collection, analysis and dissemination of data disaggregated by age and sex and urged Governments and the United Nations system to reflect the needs, perspectives and experiences of older women in development policies and programmes.

3. At its forty-first session, the Commission for Social Development requested the Secretary-General to include in his report to the General Assembly at its fifty-eighth session information on the implementation of its draft resolution IV, entitled "Modalities for the review and appraisal of the Madrid International Plan of Action on Ageing, 2002".[1] That draft resolution invited Governments as well as the United Nations system and civil society to participate in a "bottom-up" approach to the review and appraisal of the Plan, through, inter alia, sharing of ideas, data collection and best practices.

II. Implementation of the Madrid International Plan of Action on Ageing: first steps

4. During the first year of follow-up to the Second World Assembly on Ageing, progress in the implementation of the Madrid Plan of Action was visible in several areas, including intergovernmental processes, inter-agency activities, regional actions, research and information dissemination.

5. The intergovernmental process focused on defining the modalities for the review and appraisal of the implementation of the Madrid Plan of Action. In response to resolution 57/167, the Commission for Social Development, at its forty-first session, addressed, among other issues, the review and appraisal of the Plan. As a result of its deliberations, the Commission recommended to the Economic and Social Council endorsement of the bottom-up narrative approach to the review and appraisal of the Plan.

6. In February 2003, immediately after the forty-first session of the Commission for Social Development, a one-day consultative meeting of the United Nations system focal points on ageing was organized by the Department of Economic and Social Affairs. The participants at the meeting gave specific consideration to the follow-up activities of the Second World Assembly on Ageing, including the process of review and appraisal of the Madrid Plan of Action and technical cooperation activities to support implementation of the Plan. The deliberations of the meeting are expected to be presented to the High-level Committee on Programmes in order to keep system-wide implementation of the Plan on the agenda of the United Nations System Chief Executives Board for Coordination, as recommended in the Plan.

7. The regional processes aimed at translating the Madrid International Plan of Action into regional action plans have also progressed. Following the adoption of regional implementation strategies for the regions of the Economic Commission for Europe and the Economic and Social Commission for Asia and the Pacific, the secretariat of the Economic Commission for Latin America and the Caribbean (ECLAC) has advanced preparations, in collaboration with the members of the United Nations inter-agency group on ageing, for a regional ministerial meeting, which is expected to consider the regional implementation strategy for the ECLAC region. The meeting is scheduled to be held in Chile in November 2003.

8. The Department of Economic and Social Affairs programme on ageing has continued, in collaboration with the International Association of Gerontology (IAG), to develop the project on the Research Agenda on Ageing for the Twenty-First Century. The global document of the Research Agenda was adopted at the Valencia Forum in April 2002 and presented to the Second World Assembly on Ageing in Madrid. The General Assembly, in its resolution 57/177, welcomed the adoption of the Research Agenda by the Valencia Forum, to support the implementation of the Madrid Plan of Action. In March 2003, a regional consultation of experts was convened by the Department of Economic and Social Affairs Programme on Ageing and IAG with the financial support of the non-governmental organization Help the Aged UK, in Cape Town, South Africa. The consultation in Cape Town identified priorities for policy-related research on ageing in Africa, which could support the implementation of the Plan in the region. Similar meetings are organized or planned for all regions.

9. In response to resolution 57/167, the Programme on Ageing, in cooperation with the Department of Public Information, has undertaken measures to disseminate the Political Declaration and the Madrid International Plan of Action on Ageing. These include the production and distribution of the Plan in three official languages (English, French and Spanish) and the publication of a reader-friendly digest of the Plan in all six official languages. The Programme has also updated its Internet web site to present information related to the follow-up to the Second World Assembly on Ageing.

III. Road map for the implementation of the Madrid International Plan of Action on Ageing

10. The road map sets out a practical framework for implementation of the Madrid International Plan of Action on Ageing. The framework will assist countries to

elaborate strategies for the implementation of the Madrid Plan of Action at the national level by helping them to set national priorities and select approaches. Simultaneously, the road map strives to stimulate international cooperation to assist Member States in their implementation efforts.

11. The Madrid Plan of Action formulates specific objectives and proposes recommendations for action, which are organized in three priority directions: older persons and development, advancing health and well-being into old age and ensuring an enabling and supportive environment. As stated in the Plan, the priority directions are designed to guide policy formulation and implementation towards the specific goal of successful adjustment to an ageing world, in which success is measured in terms of social development, an improvement in quality of life for older persons and the sustainability of the various systems, formal and informal, that underpin the quality of well-being throughout the life course. Thus, the Plan recommends *what* could be done to adjust to an ageing world and build a society for all ages. The road map suggests *how* to move towards practical implementation of the Plan's recommendations.

12. The road map takes into consideration the recommendations of the Plan for national action for its implementation and follow-up; it also incorporates the priorities for international cooperation on ageing formulated in the Plan. It is designed with the understanding that implementation of the Madrid Plan of Action is neither a linear nor a simultaneous process: the speed and direction of action are expected to vary between and within nations. Yet two universal and essential facets of the implementation process, particularly in developing countries and countries with economies in transition, may be identified: national capacity-building and mainstreaming of ageing into the national developmental agenda. The two facets are interlinked and interdependent.

13. The implementation of the Madrid Plan of Action is an evolving process. The strategy for its implementation should also evolve as a result of implementation activities and experience and ongoing communications between all relevant international and national actors. The role of the Department of Economic and Social Affairs Programme on Ageing, as the United Nations focal point on ageing, is to facilitate the evolving project of the road map through networking within and outside the United Nations system.

A. National action

14. The Madrid Plan of Action states that its implementation will require sustained action at all levels. The national level is where the success or failure of the implementation process will be determined. Mainstreaming ageing and capacity-building are two major facets of the national implementation process.

15. Member States, in the Political Declaration adopted at the Second World Assembly on Ageing, recognized the importance of placing ageing in development agendas and committed themselves to the task of effectively incorporating ageing within social and economic strategies, policies and action. The Madrid Plan of Action underscores that a necessary first step in the successful implementation of the Plan is to mainstream ageing and the concerns of older persons into national development frameworks and poverty eradication strategies.

16. The Madrid Plan of Action signifies a move away from a "welfare approach" that tended to overemphasize the care and benefits needed to support older persons while excluding them from the development policy dialogue. The Plan states that policies on ageing deserve close examination from the developmental perspective of a broader life course and a society-wide view, taking into account recent global initiatives and the guiding principles set down by major United Nations conferences and summits. It is now increasingly recognized that national development goals will not be reached when a fast growing segment of the population remains excluded from the process of development.

17. Experience in the implementation of the Vienna International Plan of Action on Ageing (1982-2002) indicated that progress at the national level was uneven and often insufficient, particularly in developing countries and countries with economies in transition. Member States often attributed this to a lack of funding to implement the national plan, poor institutional capacity or the absence of high-level political priority for ageing issues. Programmes and projects aimed at improving the situation of older persons have repeatedly failed to attract significant donor financing and the attention of policy makers or United Nations development agencies. The links that have been missing to date are a systematic exploration of why and how older persons have been disadvantaged and excluded from mainstream development, along with efforts to promote a dialogue and assist in overcoming this exclusion. Mainstreaming ageing is not an attempt to make older persons another "new" beneficiary group or give them preferential treatment, but an attempt to ensure that people of all ages are involved in decisions and actions to promote development and can enjoy the benefits of development.

18. The Madrid Plan of Action also emphasizes the importance of national capacity-building as a prerequisite for successful implementation. The international community has learned with other mainstreaming initiatives, the most notable being gender mainstreaming, that without capacity-building, mainstreaming is unlikely to happen following the adoption of a plan of action.

19. Therefore, in order to support Member States in their implementation efforts, particularly in promoting and mainstreaming ageing into national development frameworks and poverty eradication strategies, the Department of Economic and Social Affairs is formulating a programme to assist Member States, upon their request, to implement the Madrid Plan of Action at the national level. One facet of this programme will be the convening of national workshops that will offer Member States the opportunity to focus on their implementation priorities within the context of the Plan, assess their implementation needs and available infrastructure and identify resources. During these workshops, several issues will be explored and addressed within the national implementation process, including:

(a) Benefits of and obstacles to mainstreaming issues of ageing into national development agenda;

(b) Role of national focal points and mechanisms on ageing in the development of national policy;

(c) Status of national age and sex-disaggregated data collection and analytical analysis as the basis for successful mainstreaming. The task here is to pinpoint age and gender-based exclusion and inequality in order to influence policy design, monitoring and evaluation;

(d) Participation of older persons in the processes of formulation, implementation and monitoring of the development agenda. Currently, older persons are subsumed under general beneficiary groups, such as "farmers" or "women", which often leads to their marginalization in discussions and outcomes;

(e) Building and adjusting organizational capacity in order to achieve the understanding, commitment and capacity of staff to undertake age-sensitive analysis and initiatives.

20. To lay the groundwork for national workshops, an interregional consultative meeting will be organized by the Department of Economic and Social Affairs and hosted by the Government of Austria in Vienna from 9 to 12 December 2003. The meeting will explore the parameters of future work of the Department in supporting the implementation of the Madrid Plan of Action at the national level. It is expected that the interregional meeting will propose concrete approaches to the elaboration of national implementation strategies, which would include combined efforts to promote national capacity-building and mainstream ageing issues into national development agendas and policies. In practical terms, the Vienna meeting is expected to lead to the production of training materials for national-level workshops to pilot such implementation strategies, which could be offered to interested Member States beginning during the biennium 2004-2005.

B. International action

21. The Madrid Plan of Action established that the challenges of an ageing society must also be addressed through global development agendas and that policy responses to ageing must be mainstreamed in cross-sectoral policies, programmes, objectives and priorities at the international level. According to the Plan, mainstreaming ageing into global agendas is essential and requires that ageing be linked to other frameworks for social and economic development and human rights.

22. Mainstreaming ageing at the global level requires a systematic process and strategy to incorporate ageing into all facets of development programmes and policies. It requires different thinking about respective mandates and institutional frameworks, and reduction of compartmentalization. A crucial starting point would be to incorporate ageing in the elaboration of United Nations Common Country Assessments and subsequent Development Assistance Frameworks at the country level. Mainstreaming should not create separate or new programmes where implementation becomes hindered by lack of resources. Rather, it should integrate ageing into existing processes and work programmes of the United Nations system organizations and development budgets and include older persons in policy implementation and evaluation as a matter of course.

23. Strategic plans and policies specifically targeted to older persons are still critical, but not enough to address the global reach of the ageing issue. Successful adjustment to an ageing society should not merely address the linear ascent into old age but should promote broad-scale adjustments throughout life and across social, economic and political institutions. Ageing needs to be linked to global agendas on poverty to include older poor people; on children and youth to include intergenerational issues; on the advancement of women to include older women; on rural development to include issues of ageing in rural and remote areas; and on HIV/AIDS to include its impact on older persons and to recognize the vital

contribution of older persons in keeping families and communities together in the face of HIV/AIDS.

24. The link between ageing and poverty has been neglected in the global debate on poverty reduction strategies owing to the lack of hard statistical evidence on poverty levels of older persons and knowledge about the intergenerational transmission of poverty. This neglect is most evident in the case of the Poverty Reduction Strategy Papers (PRSPs), formulated by Governments in association with the Bretton Woods institutions, and in relation to the poverty-reduction targets and social and economic development objectives contained in the Millennium Development Goals. As societies age, integrating ageing into internationally agreed outcomes would help institutions to keep pace with the changes induced by demographic trends. It is important to start with the action programmes of the Goals and to integrate ageing and other social groups into procedures governing the PRSPs so that the potential of pro-poor policies are realized to the fullest.

25. The global actions to achieve the Millennium Development Goals and implement PRSPs are providing opportunities for the involvement of all sectors of civil society and Government — including the ministries of planning and finance. An incremental approach may best incorporate ageing by setting achievable, practical targets that utilize existing data to establish policy now, rather than waiting for later when the data finally convinces policy makers of the urgency of the issue. Nonetheless, the lack of age-disaggregated data in many countries is a serious limitation to policy formulation and development. In the context of implementation and follow-up processes at the international, national and regional levels, the Madrid Plan of Action called for data collection and analysis of gender and age-specific information for policy planning, monitoring and evaluation, since research provided essential evidence for the effectiveness of policies and the basis for the future development of effective policies. **Therefore, the General Assembly may wish to consider requesting the Statistical Commission to begin to develop modalities for disaggregating statistics on the basis of age and sex as soon as possible.**

26. Thus, although dialogue on ageing as a cross-cutting theme has significantly increased among stakeholders, the inclusion of ageing in development processes is constrained by the lack of data and formulation of indicators. Currently, Millennium Development Goals indicators do not encompass age-disaggregated data. Unless in-depth participatory surveys are undertaken to extract the necessary qualitative data, older persons will, more likely than not, continue to be an overlooked group.

27. In addition to the Common Country Assessment/United Nations Development Assistance Framework mechanism, another way to integrate ageing into development processes is through the process of developing PRSPs. These provide a crucial link between national actions, donor support and the development outcomes needed to achieve the Millennium Development Goals. The integration of ageing into this process can increase capacity for policy design, including better understanding of ageing as a developmental issue; foster improved dialogue between Government and civil society about the contributions older persons make to poverty reduction as well as the multidimensional and intergenerational aspects of poverty; and facilitate more inclusive and systematic reporting of the ageing-poverty link.

28. To this end, a regional workshop will be organized by the Department of Economic and Social Affairs, in collaboration with the Government of Tanzania and HelpAge International, in October 2003 to explore the nature of the ageing-poverty

relationship in East and Central Africa and identify measures needed to incorporate an ageing-poverty focus in poverty policies and strategies (PRSPs) and into the Millennium Development Goals action programmes. The premise is that older persons are a visible and growing presence among the world's poorest people and that they are overlooked as contributors to the reduction of poverty in their communities, including in the care of orphans in areas affected by HIV/AIDS. The meeting will explore old age and intergenerational poverty within a broader development agenda, including issues of access to and control of resources, and how poverty reduction and social integration can be made central to economic and fiscal policy. It is ultimately crucial that ageing ties into the Millennium Development process in which Governments selected, within Goal 1, the target of halving, by 2015, the proportion of the world's population whose income is less than $1 a day. Without taking account of and including older persons, it is unlikely that the poverty reduction objectives will be achieved in an ageing society. **The General Assembly may therefore wish to encourage Governments and the United Nations system to ensure the incorporation of ageing into actions to achieve Goal 1 on the eradication of poverty.**

29. The Commission for Social Development seeks to encourage countries to develop poverty policies and strategies that fully take into account older persons. In addition to poverty, however, interlinkage of ageing with all the relevant issues — gender, participation and human rights, social protection and employment, health care and the environment — should be taken into account. Several United Nations system focal points are now moving to incorporate ageing into components of their work programmes both regionally and globally. But the process has yet to reach a stage where issues arising from ageing are an integral part of development policies, strategies and programmes. **The General Assembly may wish to consider requesting United Nations organizations and specialized agencies to take up the issue of mainstreaming ageing in their programmes of work and to report on their progress to the Commission for Social Development.**

IV. Gender dimensions of the Madrid International Plan of Action on Ageing and its implementation

30. In the Political Declaration, adopted by the Second World Assembly on Ageing, Governments reaffirmed their commitment to promote gender equality and recognized the need to mainstream gender perspectives into all policies and programmes to take account of the needs and experiences of older women and men. The Assembly stressed that the situation of older women was to be a priority for policy action and that recognizing the differential impact of ageing on women and men was integral to the development of effective measures to achieve full equality between women and men.

31. The Madrid Plan of Action covers such areas as women's active participation in society and development, including women's equal participation in decision-making; women's unpaid contributions to the community, including care for family members, household maintenance and voluntary work, as well as productive subsistence work; gender-sensitive policies aimed at reconciling work and caregiving responsibilities; women's participation in the labour market and related limited ability to build pensions for their retirement and independence at an older

age; their lack of control over financial and property resources; the contributions of older women in rural development; the feminization of poverty and related income security and social protection, including in emergency situations and in post-conflict reconstruction, rehabilitation and development; and women's access to knowledge, education and training and to information and communication technologies.

32. The Madrid Plan of Action recognized the particular vulnerability of older women to disability owing to, inter alia, gender differences in life expectancy and disease susceptibility and gender inequalities over the life course and called for the elimination of gender and age-based social and economic inequalities in the provision of health-care services. The Plan also emphasized the particular risks faced by older women of physical, sexual and psychological abuse, including through harmful practices, and in emergency situations.

33. In order to ensure a supportive and enabling environment, the Madrid Plan of Action emphasized the role of older women in the provision of informal care. It also recognized that women, who provided most of the informal care, carried the cost in the form of both the financial penalty of low pension contributions, forgone promotions, lower incomes, and the physical and emotional cost of the stress resulting from balancing work and household obligations. That burden had grown because of the HIV/AIDS pandemic, especially for older women, particularly in developing countries. In order to support women in that regard, Governments agreed that community-based care and support to families had to be provided, but also called for further information on how older women in caregiving could be assisted. Governments also decided to encourage the mass media to promote positive images of ageing, in particular of older women affected by misleading and negative stereotypes.

34. The situation of older women and the gender aspects of ageing should receive explicit attention from Governments and other stakeholders in order to ensure that the gender perspectives of ageing, as reflected in the Madrid Plan of Action, are adequately addressed in the implementation and review processes.

35. **The General Assembly may wish to recommend that institutional linkages be established or strengthened at the national level between national machineries for the advancement of women and those governmental programmes or bodies that have responsibility for developing, coordinating and/or implementing ageing-related policies and programmes. The involvement of non-governmental organizations focusing specifically on the situation of older women should be explicitly sought in such activities.**

36. **Opportunities for systematic attention to the gender aspects of ageing and the situation of older women should continue to be enhanced within the United Nations system. The mainstreaming of ageing should be undertaken from a gender perspective. In this regard, institutional linkages between gender focal points and focal points on ageing could strengthen technical expertise as well as increase the impact of activities.**

37. **Opportunities should be explored for further coordination and collaboration between the Commission for Social Development, responsible for follow-up to the Madrid Plan of Action, and the Commission on the Status of Women with regard to issues of older women and in the framework of their multi-year programmes of work.**

V. Modalities for review and appraisal

38. The Commission for Social Development recommended, at its forty-first session, that the Economic and Social Council endorse a bottom-up narrative approach for review and appraisal of the implementation of the Madrid Plan of Action. The bottom-up approach is an open-ended, participatory process that seeks to incorporate and link local and national activities to United Nations regional and global intergovernmental bodies.

39. The central idea is to allow the traditional intergovernmental deliberative process to benefit from a sound and carefully considered narrative assessment of whether or not the Madrid objectives are being achieved at national, local, regional and subregional levels. A number of modalities may be considered which involve a participatory approach. These entail open-ended dialogue and sharing of ideas, meetings, collection of data and best practices. Various stakeholders — at local levels in as well as outside Government and in partnership and coordination with national actors — are expected to take part.

40. In addition to the narrative approach, some Member countries will wish to monitor implementation with the help of data and indicators. However, in many developing countries, the funding to gather the data may not be available. An element of review in these countries could be mainstreamed into existing governmental and civil society monitoring exercises. The key is to ensure that the review appropriately utilizes the experience, expertise and resources of all stakeholders at the national and local levels and that the review process is linked to findings at the regional and subregional levels. Regional support to review is critical: it provides a strategic advantage in assessing the progress of implementation by serving as a bridge between national and global considerations while also addressing common areas of concern and shared interests. At the global level, the review and appraisal of the implementation of the broad range of recommendations in the Plan will vary from region to region and will require recognition of the vast diversity of the issues.

41. The Madrid Plan of Action called for ageing to be linked to development issues and to be embedded into development targets and agendas. Thus, an important component of monitoring will be to track the extent to which mainstreaming occurs and how ageing is integrated in development policies. In many developing countries, the most prominent instrument for poverty eradication is the PRSP. One important signpost of successful implementation therefore may be the extent to which ageing is integrated into national poverty policies and the PRSP process. In assessing their national poverty reduction strategies, Governments are in an excellent position simultaneously to review the implementation of the poverty, employment and human rights targets of the Madrid Plan of Action.

42. The bottom-up approach also envisages that older persons will be active participants in the review and appraisal process. This could be ensured by establishing procedures for transmitting to policy makers the views of older persons regarding the impact of policies that affect them. In order to engage civil society in policy development, monitoring and evaluation, many forms of participatory research and assessment are being used by donors, development agencies and Governments. These have far-reaching effects on policy-making in many countries. The essence of the participatory method is to listen to stakeholders and give them a

chance to state their views at different stages of the process. This allows a different type of information to emerge, which may be more qualitative in nature than the traditional quantitative monitoring indicators. The non-governmental organization HelpAge International has recently embarked on a pilot citizen-monitoring project in five countries. Groups of older persons decide on what aspects of policies which affect them they want to monitor, how they will monitor them and how they will make sure that the outcomes reach the appropriate government officials. The Department of Economic and Social Affairs is following this initiative to illustrate "lessons learned" and best practices for Member States in the review and appraisal process of the Madrid Plan of Action.

43. An expert group meeting will be organized by the Department of Economic and Social Affairs in cooperation with the Government of Malta and the International Institute on Ageing, in Valletta in November 2003 to explore further the review and appraisal of the Madrid Plan of Action, identify modalities for the bottom-up approach and coordinate with and involve intergovernmental organizations and civil society to the greatest extent possible.

44. While the principal approach to the review and appraisal of the Madrid Plan of Action is now defined, additional efforts are required to clarify the content of modalities and periodicity of the review and appraisal process. **The General Assembly may wish to request the Commission for Social Development to take up this task at its forty-second session in 2004.** Additionally, the Madrid Plan of Action called for the Commission to integrate the different dimensions of population ageing in its work. **Thus, the Assembly may wish to suggest that the Commission apply an ageing perspective in its consideration of priority themes related to the follow-up to the World Summit for Social Development.**

Notes

[1] See *Official Records of the Economic and Social Council, 2003, Supplement No. 26* (E/2003/26).